C3400-1.43

# Men's Sportswear, Casual Wear and Jeans

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

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E.B. Gold, Manager
Fairchild Book Division


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Standard Book Number: 87005-423-6

Printed in the United States of America

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS & ACTIVE WEAR

## Market Trends

The state of the U.S. economy will be the dominant factor affecting men's sportswear sales in 1982. For the 12-month period ending May 1982, National Panel Diary (NPD) reports, issued by an independent research company, indicate that dollar sales of all types of men's and boys' wear were ahead of the previous 12-month period by only 3.1%. Kurt Salmon Associates, management consultants, projected a 4% increase in unit sales of men's and boys' wear for the entire year, with projected dollar sales up 10% over 1981.

Both manufacturers and retailers place much of the blame for this lackluster showing on the economy. They are optimistic, however, that beginning in the fall 1982 season the sales picture will improve as retailers move to reestablish their inventories with fresh goods, and the consumer returns to a buying mood.

Several sportswear items are counted on heavily to revive the category. One of these items is casual slacks. Due to the maturation of the jeans market and the increasing numbers of males in the over-35 age bracket, casual non-denim slacks are assuming a larger share of retail trouser inventories. According to NPD, dollar sales in the men's pants, jeans, slacks and shorts classification gained 5.1% in the year ended May 1982 compared with the previous 12 months.

The boom in men's active sportswear sales continued in 1981 but may have reached its peak, according to some retailers. In order to spice up the category and instill it with a new sales life, designer labels, which for the most part had bypassed active sportswear, are being employed. If growth is to continue in this category, it must come from males who want active sportswear for the active "look," not necessarily as a functional item. Designer labels, it is felt, will help attract this type of customer.

In other sportswear areas, however, the designer label influence is waning. The preponderance of designer names has made it difficult for the average consumer to identify with them (Men's Wear, July 16, 1982). In addition, department and specialty stores have found that developing their own private label goods, which usually means dropping some of the designer lines they carry, results in a unique fashion image for the store.

Men's better sportswear has sold well and now constitutes 10%-20% of most department stores' total men's wear volume (Daily News Record, May 10, 1982). Their continued success is attributed to the typical customer for these goods: a clothes conscious man who buys frequently in all seasons and who, because of his income level, is recession-proof while seeking quality and value in his purchases. Retailers are seeking to attract these upscale customers with upper-moderate and better price points in active-spectator wear.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Men's sportswear/casual wear is not a distinct, separately reported industry. Merchandise of this type is combined in several industry classifications under the Standard Industrial Classification system.

The estimated shipment value of all products shipped by manufacturers classified in the men's and boys' separate trousers industry (including secondary products and miscellaneous receipts) in 1981, as reported in the 1982 U.S. Industrial Outlook was $2.3 billion, 36.0% higher than in 1977 and a 16.5% jump over the estimated 1980 shipment value.

Estimated 1980 shipment value of all products and miscellaneous receipts from the men's and boys' clothing, n.e.c. (not elsewhere classified) industry, which primarily includes sportswear and outerwear, increased 25% over 1977 to $1.3 billion. This value was up 5.3% over 1980.

Men's & Boys' Clothing, n.e.c. (SIC 2329*)
(Primarily Sportswear/Outerwear)

| | 1980 | 1979 | 1978 | 1977 | % Change 1980/1979 |
|---|---|---|---|---|---|
| Number of companies | na | na | na | 553 | -- |
| Number of establishments** | na | 605 | 577 | 632 | -- |
| With 20 or more employees | na | 407 | 396 | 400 | -- |
| Total employment (thous.) | 43.4 | 45.6 | 46.8 | 43.8 | - 4.8% |
| Production workers (thous.) | 37.2 | 39.1 | 42.5 | 38.1 | - 4.9 |
| Payroll (mil. $) | $ 371.2 | $ 343.3 | $ 326.3 | $ 258.8 | + 8.1 |
| Value added by manufacture (mil. $)# | 745.7 | 695.1 | 624.6 | 542.8 | + 7.3 |
| Value of shipments (mil. $)## | 1,331.1 | 1,263.9 | 1,184.4 | 1,065.1 | + 5.3 |
| Capital expenditures, new (mil. $) | 15.1 | 15.3 | 24.1 | 20.2 | - 1.3 |

Knit Outerwear Mills (SIC 2253*)

| | 1980 | 1979 | 1978 | 1977 | % Change 1980/1979 |
|---|---|---|---|---|---|
| Number of companies | na | na | na | 903 | -- |
| Number of establishments** | na | 884 | 782 | 953 | -- |
| With 20 or more employees | na | 459 | 455 | 551 | -- |
| Total employment (thous.) | 67.1 | 61.9 | 72.1 | 73.0 | + 8.4% |
| Production workers (thous.) | 57.9 | 53.4 | 62.8 | 62.7 | + 8.4 |
| Payroll (mil. $) | $ 637.4 | $ 548.1 | $ 608.5 | $ 582.0 | +16.3 |
| Value added by manufacture (mil. $)# | 1,339.1 | 1,096.0 | 1,202.8 | 1,159.5 | +22.2 |
| Value of shipments (mil. $)## | 2,571.7 | 2,220.8 | 2,333.3 | 2,335.9 | +15.8 |
| Capital expenditures, new (mil. $) | 48.5 | 35.6 | 44.2 | 49.9 | +36.2 |

GENERAL STATISTICS ON THE INDUSTRY

Leather & Sheep-Lined Clothing (SIC 2386*)

| | 1980 | 1979 | 1978 | 1977 | % Change 1980/1979 |
|---|---|---|---|---|---|
| Number of companies | na | na | na | 236 | -- |
| Number of establishments** | na | 169 | 186 | 239 | -- |
| With 20 or more employees | na | 64 | 76 | 80 | -- |
| Total employment (thous.) | 8.0 | 7.0 | 5.8 | 6.7 | + 14.3% |
| Production workers (thous.) | 7.2 | 6.3 | 5.1 | 5.9 | + 14.3 |
| Payroll (mil. $) | $ 63.5 | $ 56.3 | $ 50.2 | $ 54.7 | + 12.8 |
| Value added by manufacture (mil. $)# | 100.8 | 93.4 | 74.1 | 94.8 | + 7.9 |
| Value of shipments (mil. $)## | 215.3 | 210.4 | 222.9 | 214.1 | + 2.3 |
| Capital expenditures, new (mil. $) | 0.7 | 1.1 | 2.6 | 1.6 | - 36.4 |

Men's & Boys' Shirts & Nightwear (SIC 2321*)

| | 1981(e) | 1980 | 1979 | 1978 | 1977 |
|---|---|---|---|---|---|
| Number of companies | na | na | na | na | 669 |
| Number of establishments** | na | na | 779 | 751 | 928 |
| With 20 or more employees | na | na | 597 | 580 | 679 |
| Total employment (thous.) | 112.3 | 115.9 | 120.7 | 116.0 | 114.7 |
| Production workers (thous.) | 99.3 | 103.9 | 108.4 | 106.6 | 103.0 |
| Payroll (mil. $) | na | $ 931.0 | $ 885.5 | $ 768.2 | $ 711.3 |
| Value added by manufacture (mil. $)# | na | 1,813.5 | 1,633.5 | 1,630.2 | 1,445.7 |
| Value of shipments (mil. $)## | $4,076.0 | 3,479.5 | 3,251.0 | 3,170.3 | 2,934.6 |
| Capital expenditures, new (mil. $) | na | 42.5 | 36.2 | 42.6 | 25.9 |

Men's & Boys' Separate Trousers (SIC 2327*)

| | 1981(e) | 1980 | 1979 | 1978 | 1977 |
|---|---|---|---|---|---|
| Number of companies | na | na | na | na | 404 |
| Number of establishments** | na | na | 419 | 511 | 514 |
| With 20 or more employees | na | na | 302 | 396 | 335 |
| Total employment (thous.) | 62.8 | 64.1 | 66.6 | 65.7 | 70.9 |
| Production workers (thous.) | 55.4 | 55.8 | 57.8 | 58.0 | 61.9 |
| Payroll (mil. $) | na | $ 528.1 | $ 507.7 | $ 469.8 | $ 474.0 |
| Value added by manufacture (mil. $)# | na | 1,102.0 | 1,050.7 | 983.0 | 845.6 |
| Value of shipments (mil. $)## | $2,337.0 | 2,006.6 | 1,980.5 | 1,946.6 | 1,718.0 |
| Capital expenditures, new (mil. $) | na | 20.5 | 15.2 | 26.6 | 22.8 |

(e) = estimated.
na = not available.
n.e.c. = not elsewhere classified.

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2329 covers manufacturers specializing in the production of men's and boys' heavy outerwear coats and jackets, swimwear and athletic shorts, ski and snow pants and other outerwear not elsewhere classified made in cut-and-sew plants.

SIC 2253 covers mills primarily engaged in knitting outerwear (men's, women's, children's) from yarn or in manufacturing outerwear from knit fabric produced in the same mill.

SIC 2386 covers manufacturers primarily engaged in manufacturing leather and sheep-lined garments for men, boys, women and children.

SIC 2321 covers establishments primarily engaged in the manufacture of men's, youths' and boys' shirts (including dress, polo and sport shirts, but not including work shirts) and nightwear cut and sewn from purchased woven or knit fabric.

SIC 2327 covers establishments primarily engaged in the manufacture of men's, youths' and boys' separate trousers and slacks.

**Each business location is counted as a separate establishment. 1979 and 1978 data on number of establishments include only those with payrolls.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, is covered on page 16.

Source: U. S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1978, 1979, 1980;
County Business Patterns 1978, 1979; U.S.
Department of Commerce, Bureau of Industrial
Economics, 1982 U.S. Industrial Outlook.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Average employment in knit outerwear mills during 1981 rose 3.2% to 71.5 thousand employees from 69.3 thousand in 1980. The number of production workers in the industry increased 2.2% to 60.7 thousand. During the same period, average earnings of production workers gained 5.1% to $188.87, despite a 2.3% decline in the number of hours they worked.

The number of employees in both the shirts and nightwear industry and the separate trousers industry fell in 1981, by 1.8% and 5.7% respectively. Production workers employed in these industries declined at the rate of 2.4% in the shirts and nightwear industry and 5.6% in the separate trousers industry.

Employment & Earnings in Men's Sportswear Manufacturing

| | January - April | | Annual Averages | | % Change |
|---|---|---|---|---|---|
| | 1982 | 1981 | 1981 | 1980 | 1981/1980 |
| Knit outerwear mills (SIC 2253) | | | | | |
| All employees (thous.) | 66.5 | 69.2 | 71.5 | 69.3 | + 3.2% |
| Production workers (thous.) | 55.9 | 58.7 | 60.7 | 59.4 | + 2.2 |
| Avg. weekly earnings | $ 184.85 | $ 184.86 | $188.87 | $179.63 | + 5.1 |
| Avg. hourly earnings | 5.24 | 4.96 | 5.05 | 4.69 | + 7.7 |
| Avg. weekly hours | 35.3 | 37.3 | 37.4 | 38.3 | - 2.3 |
| Men's & boys' shirts & nightwear (SIC 2321) | | | | | |
| All employees (thous.) | 92.7 | 96.0 | 97.4 | 99.2 | - 1.8 |
| Production workers (thous.) | 79.6 | 82.2 | 83.7 | 85.8 | - 2.4 |
| Avg. weekly earnings | $ 160.04 | $ 158.10 | $ 160.92 | $ 149.14 | + 7.9 |
| Avg. hourly earnings | 4.67 | 4.43 | 4.47 | 4.12 | + 8.5 |
| Avg. weekly hours | 34.3 | 35.7 | 36.0 | 36.2 | - 0.5 |
| Men's & boys' separate trousers (SIC 2327) | | | | | |
| All employees (thous.) | 69.0 | 71.7 | 71.5 | 75.8 | - 5.7 |
| Production workers (thous.) | 54.3 | 62.7 | 62.4 | 66.1 | - 5.6 |
| Avg. weekly earnings | $ 163.28 | $ 165.65 | $ 168.59 | $ 153.28 | +10.0 |
| Avg. hourly earnings | 4.68 | 4.84 | 4.67 | 4.33 | + 7.8 |
| Avg. weekly hours | 35.4 | 33.7 | 36.1 | 35.4 | + 2.0 |

Source: U. S. Bureau of Labor Statistics, Employment & Earnings, June 1982 (Revised); July 1982.

GENERAL STATISTICS ON THE INDUSTRY

## Concentration in the Industry

### Number of Men's & Boys' Sportswear Manufacturing Establishments By Employment Size, 1979

| | Total No. of Establishments* | No. of Establishments by Employment Size | | | | | |
|---|---|---|---|---|---|---|---|
| | | Under 10 | 10-19 | 20-49 | 50-99 | 100-499 | 500+ |
| Knit outerwear mills (SIC 2253) | 884 | 82 | 55 | 94 | 57 | 94 | 5 |
| Leather & sheep-lined clothing (SIC 2386) | 169 | 73 | 32 | 31 | 17 | 16 | -- |
| Men's & boys': | | | | | | | |
| Clothing, n.e.c. (SIC 2329) | 638 | 145 | 86 | 123 | 143 | 137 | 4 |
| Shirts & nightwear (SIC 2321) | 779 | 120 | 62 | 119 | 120 | 130 | 3 |
| Separate trousers (SIC 2327) | 419 | 90 | 27 | 54 | 57 | 170 | 17 |

* Includes only establishments with payrolls
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns 1979.

### Concentration Ratios in Men's & Boys' Sportswear Manufacturing, 1977

| | Value of Shipments (Mil. $) | Percent Accounted For By: | | | |
|---|---|---|---|---|---|
| | | 4 largest companies | 8 largest companies | 20 largest companies | 50 largest companies |
| Men's & boys' clothing, n.e.c. (SIC 2329) | $ 1,065.1 | 12% | 22% | 38% | 59% |
| Knit outerwear mills (SIC 2253) | 2,335.9 | 17 | 27 | 46 | 63 |
| Leather & sheep-lined clothing (SIC 2386) | 214.1 | 16 | 28 | 50 | 78 |
| Men's & boys' shirts & nightwear (SIC 2321) | 2,934.6 | 17 | 28 | 48 | 65 |
| Men's & boys' separate trousers (SIC 2327) | 1,718.0 | 25 | 40 | 59 | 77 |

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

## Location of the Industry

Half of all knit outerwear mills operating in 1977 were located in New York State. This state was also the home of more manufacturing establishments engaged in the men's and boys' shirts and nightwear, separate trousers and clothing, n.e.c. industries, as well as the leather and sheep-lined clothing industry, than any other state.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Texas plants classified in the men's and boys' separate trousers industry shipped $346.2 million worth of goods although they represented only 4.9% of all manufacturing establishments in the industry. In comparison, New York State plants, 20.0% of the industry total, shipped $269.6 million in goods.

Leading Manufacturing States in the Men's & Boys' Sportswear Industry, 1977

| | No. of Establishments | | Value Added by Manufacture (Mil. $) | Value of Shipments (Mil. $) |
|---|---|---|---|---|
| | Total | With 20+ Employees | | |
| Knit outerwear mills (SIC 2253) | | | | |
| U.S. total | 953 | 551 | $ 1,159.5 | $ 2,335.9 |
| Leading States: | | | | |
| New York | 477 | 254 | 259.5 | 628.4 |
| New Jersey | 98 | 51 | 56.5 | 95.1 |
| Pennsylvania | 84 | 67 | 206.8 | 406.0 |
| California | 73 | 33 | 34.6 | 57.6 |
| North Carolina | 45 | 30 | 106.0 | 217.3 |
| Virginia | 10 | 10 | 151.1 | 237.2 |
| Total | 787 | 445 | 814.5 | 1,641.6 |
| % of U.S. total | 82.6% | 80.8% | 70.2% | 70.3% |
| Men's & boys' shirts & nightwear | | | | |
| (SIC 2321) U.S. total | 928 | 679 | 1,445.7 | 2,934.6 |
| Leading States: | | | | |
| New York | 156 | 69 | 161.8 | 463.2 |
| California | 130 | 76 | 98.8 | 241.1 |
| North Carolina | 85 | 71 | 122.9 | 251.5 |
| Pennsylvania | 76 | 67 | 126.2 | 245.8 |
| Alabama | 62 | 60 | 166.2 | 320.6 |
| Tennessee | 59 | 54 | 143.3 | 290.1 |
| Total | 568 | 397 | 819.2 | 1,812.3 |
| % of U.S. total | 61.2% | 58.5% | 56.7% | 61.8% |
| Men's & boys' separate trousers | | | | |
| (SIC 2327) U.S. total | 514 | 335 | 845.6 | 1,718.0 |
| Leading States: | | | | |
| New York | 103 | 33 | 108.3 | 269.6 |
| Georgia | 58 | 56 | 107.1 | 210.4 |
| Pennsylvania | 53 | 42 | 49.1 | 80.7 |
| California | 41 | 15 | 26.2 | 42.2 |
| Alabama | 27 | 27 | 56.5 | 79.2 |
| Texas | 25 | 19 | 136.0 | 346.2 |
| Total | 277 | 192 | 483.2 | 949.1 |
| % of U.S. total | 53.9% | 57.3% | 57.1% | 55.2% |

(continued)

GENERAL STATISTICS ON THE INDUSTRY

## Location of the Industry

### Leading Manufacturing States in the Men's & Boys' Sportswear Industry, 1977 (continued)

| | No. of Establishments | | Value Added by Manufacture | Value of Shipments |
|---|---|---|---|---|
| | Total | With 20+ Employees | (Mil. $) | (Mil. $) |
| Men's & boys' clothing, n.e.c. (SIC 2329) U.S. total | 632 | 400 | $ 542.8 | $1,065.1 |
| Leading States: | | | | |
| New York | 110 | 51 | 66.6 | 165.0 |
| California | 64 | 29 | 42.3 | 82.5 |
| Pennsylvania | 56 | 43 | 44.5 | 77.7 |
| New Jersey | 35 | 20 | 36.9 | 93.7 |
| Tennessee | 27 | 20 | 28.3 | 64.2 |
| Washington | 22 | 19 | 37.0 | 74.0 |
| Total | 314 | 182 | 255.6 | 557.1 |
| % of U.S. total | 49.7% | 45.5% | 47.1% | 52.3% |
| Leather & sheep-lined clothing (SIC 2386) U.S. total | 239 | 80 | 94.8 | 214.1 |
| Leading States: | | | | |
| New York | 116 | 37 | 33.7 | 92.3 |
| California | 40 | 9 | 12.5 | 26.9 |
| New Jersey | 15 | 10 | 11.3 | 23.3 |
| Massachusetts | 8 | 6 | 10.7 | 19.9 |
| Total | 179 | 62 | 68.2 | 162.4 |
| % of U.S. total | 74.9% | 77.5% | 71.9% | 75.8% |

n.e.c. = not elsewhere classified.

Source: Based on the U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series.

## Manufacturers' Operating Ratios

### Manufacturing Ratios in the Men's & Boys' Sportswear Industry, 1980 (Median Results)

| | Current Assets to Current Debt (times) | Net Profit on Net Sales (%) | Net Profit on Net Worth (%) | Net Sales to Inventory (times) |
|---|---|---|---|---|
| Knit outerwear mills (SIC 2253) (180)* | 1.82 | 1.82% | 13.55% | 10.8 |
| Leather & sheep-lined clothing (SIC 2386) (34)* | 1.84 | 3.43 | 27.08 | 6.1 |

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Manufacturing Ratios in the Men's & Boys' Sportswear Industry, 1980
(Median Results)
(continued)

| | Current Assets to Current Debt (times) | Net Profit on Net Sales (%) | Net Profit on Net Worth (%) | Net Sales to Inventory (times) |
|---|---|---|---|---|
| Men's & boys': | | | | |
| Separate trousers (SIC 2327)(92)* | 2.00 | 1.69 | 13.03 | 5.9 |
| Shirts & nightwear (SIC 2321) (156)* | 1.88 | 2.40 | 15.95 | 7.1 |
| Clothing, n.e.c. (SIC 2329) (180)* | 2.07 | 3.19 | 22.74 | 5.9 |

n.e.c. = not elsewhere classified
* Number in parentheses refers to the number of reporting firms in each category.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980,
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PRODUCTION

Based on data compiled by the U.S. Bureau of the Census and other sources, the National Cotton Council of America has compiled estimates on production of men's wear for the year 1981, updating the latest available Annual Survey for 1980 issued by the Census Bureau in the Current Industrial Reports Series.

Production of Reported Types of Men's Sportswear/Casual Wear, 1980, 1981
(Thousands of Units)

| | 1981 (p) | 1980 | % Change |
|---|---|---|---|
| Men's active apparel | | | |
| Athletic shorts (jogging, tennis) | 18,876 | 17,160 | + 10.0% |
| Athletic uniforms (including boys') | 34,848 | 33,324 | + 4.6 |
| Warm-up jogging suits (including boys') | 21,372 | 20,952 | + 2.0 |
| Swimwear (including boys') | 21,912 | 20,868 | + 5.0 |
| Dress & sport coats (tailored) | 16,320 | 15,540 | + 5.0 |
| Nontailored men's wear | | | |
| Casual sport coats/jackets | 756 | 786 | - 3.8 |
| Heavyweight jackets, including ski* | 18,984 | 18,612 | + 2.0 |
| Lightweight jackets, including uniform | 27,672 | 22,248 | + 24.4 |
| Suits, casual | 708 | 742 | - 4.6 |
| Dress & sport trousers | 123,744 | 118,980 | + 4.0 |
| Jean-cut trousers (including jeans made of other-than-denim fabrics) | 62,988 | 64,940 | - 3.0 |

(continued)

PRODUCTION

Production of Reported Types of Men's Sportswear/Casual Wear, 1980, 1981
(Thousands of Units)
(continued)

| | 1981 (p) | 1980 | % Change |
|---|---|---|---|
| Jeans, dungarees (denim only) | 150,960 | 188,700 | - 20.0% |
| Outerwear shorts (other than athletic) | 4,932 | 4,494 | + 9.7 |
| Separate vests | 4,176 | 4,394 | - 5.0 |
| Overalls, work type | 2,652 | 2,952 | - 10.2 |
| Other overalls, jumpsuits, coveralls | 12,396 | 13,044 | - 5.0 |
| Sport shirts | | | |
| Knit | 316,032 | 325,800 | - 3.0 |
| Woven | 67,020 | 74,460 | - 10.0 |
| Sweatshirts, knit | 54,780 | 53,184 | + 3.0 |
| Sweaters (including sweater vests) | 36,360 | 36,652 | - 0.8 |

(p) = preliminary
* See table below.

Source: National Cotton Council of America, Cotton Counts Its Customers; U.S. Bureau of the Census.

Additional detail on skiwear (included in the above data) is provided by the Census Bureau in the latest annual apparel survey. (The report for 1981 is scheduled for release at the end of 1982).

Production of Men's & Boys' Skiwear, 1979, 1980
(Thousands of Units)

| | 1980 | 1979 | % Change |
|---|---|---|---|
| Ski jackets | 2,556 | 3,144 | - 6.9% |
| Ski pants | 372 | | |

Source: U.S. Bureau of the Census, Current Industrial Reports, Men's & Boys' Outerwear (MA23E(80)-1).

PRODUCTION

Monthly data on production compiled by the Census Bureau among a sample of men's wear manufacturers indicate the following monthly pattern in production in 1981.

Percent of Year's Cuttings by Month, 1981

| | Jeans & Dungarees | Jean-cut Casual Slacks | Sport Shirts Knit | Sport Shirts Woven | Sweaters* |
|---|---|---|---|---|---|
| January | 11.4% | 9.5% | 9.0% | 9.1% | 5.6% |
| February | 9.1 | 8.2 | 9.5 | 7.3 | 5.6 |
| March | 11.3 | 9.9 | 10.2 | 8.2 | 6.4 |
| April | 9.7 | 7.8 | 8.7 | 9.9 | 5.9 |
| May | 7.7 | 9.0 | 9.1 | 8.6 | 7.1 |
| June | 7.5 | 9.3 | 9.0 | 7.8 | 8.3 |
| July | 7.8 | 7.8 | 7.0 | 7.7 | 9.4 |
| August | 6.6 | 8.3 | 7.9 | 8.7 | 10.3 |
| September | 9.8 | 11.2 | 8.2 | 8.7 | 12.5 |
| October | 7.3 | 8.2 | 7.7 | 9.0 | 12.4 |
| November | 5.8 | 5.6 | 7.4 | 7.9 | 9.9 |
| December | 6.1 | 5.1 | 6.2 | 7.0 | 6.5 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

* Percent of shipments, not cuttings.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Men's Apparel M23B(81)-12.

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980

| | Production (Thous. Units) 1980 | Production (Thous. Units) 1979 | % Change 1980/1979 |
|---|---|---|---|
| Men's casual (nontailored) suits | 742 | 833 | - 10.9% |
| Woven fabric: | | | |
| All cotton & chiefly cotton | 95 | 117 | - 18.8 |
| All man-made & chiefly man-made | 372 | 344 | + 8.1 |
| All wool & chiefly wool | 135 | 143 | - 5.6 |
| All other fabric | | | |
| Knit fabric: | | | |
| All cotton & chiefly cotton | 140 | 229 | |
| All man-made & chiefly man-made | | | |
| All wool & chiefly wool | na | | |
| All other fabric | na | | |

(continued)

## Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980 (continued)

| | Production (Thous. Units) 1980 | 1979 | % Change 1980/1979 |
|---|---|---|---|
| Men's casual (nontailored) sport coats & jackets | 786 | 1,365 | - 42.4% |
| Woven fabric: | | | |
| All cotton & chiefly cotton | 401 | 850 | - 52.8 |
| All man-made & chiefly man-made | 79 | 114 | - 30.7 |
| All wool & chiefly wool<br>All other fabric | 204 | 167 | + 22.1 |
| Knit fabric: | | | |
| All cotton & chiefly cotton<br>All man-made & chiefly man-made<br>All wool & chiefly wool<br>All other fabric | 102 | 234 | - 56.4 |
| Men's heavy nontailored outer jackets except ski, including uniform | 18,768 | 20,340 | - 7.7 |
| By construction: | | | |
| Woven fabric | 13,872 | 15,300 | - 9.3 |
| Knit fabric | 1,920 | 1,980 | - 3.0 |
| Construction, n.s.k. | 2,976 | 3,060 | - 2.7 |
| By fabric: | | | |
| All cotton & chiefly cotton | 3,876 | 4,608 | - 15.9 |
| All man-made & chiefly man-made | 9,984 | 10,980 | - 9.1 |
| All wool & chiefly wool | 1,332 | 1,368 | - 2.6 |
| All other fabric | 960 | 684 | + 40.3 |
| Fabric, n.s.k. | 2,616 | 2,700 | - 3.1 |
| Uniform jackets | 1,812 | 1,608 | + 12.7 |
| Men's light nontailored outer jackets, including uniform | 22,248 | 21,144 | + 5.2 |
| By construction: | | | |
| Woven fabric | 13,644 | 12,660 | + 7.8 |
| Knit fabric | 6,840 | 6,228 | + 9.8 |
| Construction, n.s.k. | 1,764 | 2,256 | - 21.8 |
| By fabric: | | | |
| All cotton & chiefly cotton | 4,668 | 5,364 | - 13.0 |
| All man-made & chiefly man-made | 13,284 | 11,844 | + 12.2 |
| All wool & chiefly wool | 756 | 672 | + 12.5 |
| All other fabric | 3,540 | 3,264 | + 8.5 |

(continued)

## Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980 (continued)

| | Production (Thous. Units) 1980 | 1979 | % Change 1980/1979 |
|---|---|---|---|
| Men's separate dress & sport trousers, including uniform | 124,011 | 125,617 | - 1.3% |
| By price (per unit): | | | |
| Under $4.25 / $4.25 to $5.00 | 3,868 | 5,684 | - 31.9 |
| $5.00 to $8.99 | 36,055 | 42,791 | - 15.7 |
| $9.00 to $12.49 | 50,658 | 45,402 | + 11.6 |
| $12.50 & over | 26,355 | 23,695 | + 11.2 |
| Price line, n.s.k. | 7,075 | 8,045 | - 12.1 |
| By fabric: | | | |
| Woven fabric: | | | |
| All cotton & chiefly cotton | 10,272 | 11,727 | - 12.4 |
| Man-made/wool blends, chiefly man-made | 8,217 | 8,523 | - 3.6 |
| All man-made & chiefly man-made, except man-made/wool blends | 52,508 | 56,470 | - 7.0 |
| All wool & chiefly wool | 7,173 | 5,979 | + 20.0 |
| All other fabric | 5,086 | 4,509 | + 12.8 |
| Knit fabric: | | | |
| All cotton & chiefly cotton | 3,292 | 3,289 | + 0.1 |
| All man-made & chiefly man-made | 29,653 | 27,116 | + 9.4 |
| All wool & chiefly wool / All other fabric | 54 | 11 | +390.9 |
| Fabric, n.s.k. | 7,756 | 7,993 | - 3.0 |
| Uniform trousers | 5,032 | 4,433 | + 13.5 |
| Men's jeans & dungarees | 188,700 | 167,371 | + 12.7 |
| All cotton & chiefly cotton | 184,532 | 165,113 | + 11.8 |
| All man-made & chiefly man-made | 4,168 | 2,258 | + 84.6 |
| Men's jean-cut casual slacks | 64,940 | 64,447 | + 0.8 |
| Woven fabric: | | | |
| All cotton & chiefly cotton | 49,207 | 49,297 | - 0.2 |
| All man-made & chiefly man-made | 13,037 | 10,726 | + 21.5 |
| All other fabric | na | na | -- |
| Knit fabric: | | | |
| All cotton & chiefly cotton / All man-made & chiefly man-made / All other fabric | 2,696 | 4,424 | - 39.1 |

(continued)

## Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980 (continued)

| | Production (Thous. Units) 1980 | 1979 | % Change 1980/1979 |
|---|---|---|---|
| Men's shorts, excluding athletic shorts | 4,494 | 4,870 | - 7.7% |
| By fabric: | | | |
| All cotton & chiefly cotton | 2,548 | 2,916 | - 12.6 |
| All man-made & chiefly man-made | 1,917 | 1,833 | + 4.6 |
| All other fabric / Fabric, n.s.k. | 29 | 121 | - 76.0 |
| By construction: | | | |
| Woven fabric | 2,645 | 2,851 | - 7.2 |
| Knit fabric | 1,849 | 2,019 | - 8.4 |
| Men's woven sport shirts | 74,460 | 84,468 | - 11.8 |
| All cotton & chiefly cotton | 16,620 | 26,136 | - 36.4 |
| All man-made & chiefly man-made | 52,920 | 54,312 | - 2.6 |
| All wool & chiefly wool / All other fabric | 2,112 | 876 | +141.1 |
| Fabric, n.s.k. | 2,808 | 3,144 | - 10.7 |
| Men's knit sport shirts, except sweatshirts | 325,800 | 291,588 | + 11.7 |
| By fabric: | | | |
| All cotton & chiefly cotton | 116,904 | 153,396 | - 23.8 |
| All man-made & chiefly man-made | 191,292 | 124,956 | + 53.1 |
| All wool & chiefly wool / All other fabric / Fabric, n.s.k. | 17,604 | 13,236 | + 33.0 |
| By type: | | | |
| Full open front shirts | 13,476 | 15,252 | - 11.6 |
| Partial front opening (golf, polo-type) | 78,528 | 72,576 | + 8.2 |
| T-shirts made for outerwear, including tanktops | 213,744 | 182,568 | + 17.1 |
| Type, n.s.k. | 20,052 | 21,192 | - 5.4 |
| Men's sweaters including sweater vests, knit cardigans & pullovers | 35,652 | 33,732 | + 5.7 |
| All cotton & chiefly cotton | 624 | 348 | + 79.3 |
| All man-made & chiefly man-made | 22,932 | 21,420 | + 7.1 |
| All wool & chiefly wool | 8,460 | 8,412 | + 0.6 |
| All other fiber / Fiber, n.s.k. | 876 | 1,524 | - 42.5 |

(continued)

PRODUCTION

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980 (continued)

| | Production (Thous. Units) 1980 | 1979 | % Change 1980/1979 |
|---|---|---|---|
| Men's & boys' athletic shorts, including jogging shorts & tennis shorts | 33,492 | 26,664 | + 25.6% |
| Men's & boys' sweatshirts | 69,972 | 50,208 | + 39.4 |
| Men's & boys' warm-up or jogging suits | 20,952 | 16,476 | + 27.2 |
| Men's & boys' swimwear | 20,868 | 21,672 | - 3.7 |
| woven fabric | 15,672 | 16,056 | - 2.4 |
| knit fabric | 5,196 | 5,616 | - 7.5 |
| Men's & boys' ski jackets, including ski vests | 2,556 | 3,144 | - 6.9 |
| Men's & boys' ski pants | 372 | | |

na = not available.
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, Men's & Boys' Outerwear MA23E(80)-1.

SHIPMENTS

The value of shipments of men's trousers, slacks and shorts rose 14.5% in 1980 to $3.3 million from $2.9 million in 1979. Jeans and dungarees increased 21.1% in value, to $1.4 million, surpassing the shipment value of separate dress and sport trousers ($1.3 million), which rose 7.5% compared with the 1979 value.

Active sportswear items increased faster in value than other men's sportswear items tracked by the Census Bureau in 1980. Men's and boys' athletic shorts rose 40.8%, warm-up or jogging suits 38.3% and sweatshirts 34.4% over their 1979 shipment values.

In the 1982 U.S. Industrial Outlook, the Bureau of Industrial Economics estimates the shipment value of men's and boys' separate dress and sport trousers from all U.S. producers was $1.8 billion, up 3.1% from the 1980 value of $1.6 billion. U.S. manufacturers of men's & boys' shirts and nightwear shipped $3.3 billion worth of these goods, a leap of 14.9% over the previous years total of $2.8 billion.

Value of Shipments of Specified Men's Sportswear Items
By All U.S. Manufacturers, 1979, 1980
(Millions of $)

| | 1980 | 1979 | % Change 1980/1979 |
|---|---|---|---|
| Casual (nontailored) suits | $ 35.0 | $ 32.8 | + 6.7% |
| Casual (nontailored) sport coats & jackets | 26.9 | 26.3 | + 2.3 |
| Heavy nontailored outer jackets, excluding ski, including uniform | 389.3 | 390.3 | - 0.2 |
| Light nontailored outer jackets, including uniform | 218.8 | 188.7 | + 15.9 |
| Trousers, slacks & shorts, total | 3,307.5 | 2,888.3 | + 14.5 |
| Separate dress & sport trousers, including uniform | 1,339.1 | 1,245.3 | + 7.5 |
| Jeans & dungarees | 1,372.5 | 1,133.0 | + 21.1 |
| Jean-cut casual slacks | 567.9 | 483.8 | + 17.4 |
| Shorts, excluding athletic shorts | 28.0 | 26.2 | + 6.9 |
| Sport shirts, total | 1,472.9 | 1,346.7 | + 9.4 |
| Woven sport shirts | 447.6 | 493.7 | - 9.3 |
| Knit sport shirts, excluding sweatshirts | 1,025.3 | 853.0 | - 20.2 |
| Sweaters, cardigans, pullovers & sweater vests | 303.4 | 245.6 | + 23.5 |
| Athletic shorts, including jogging & tennis shorts (incl. boys') | 87.3 | 62.0 | + 40.8 |
| Sweatshirts (incl. boys') | 258.4 | 192.2 | + 34.4 |
| Warm-up or jogging suits (incl. boys') | 127.6 | 92.3 | + 38.2 |
| Swimwear (incl. boys') | 95.0 | 87.1 | + 9.1 |
| Ski jackets (incl. boys') | 74.8 | 84.8 | + 3.1 |
| Ski pants (incl. boys') | 12.6 | | |

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear (MA23E(80)-1).

Leading States

Value of Shipments of Men's & Boys' Sportswear by All Producers
By Leading States, 1972, 1977

| | Value of Shipments 1977 | 1972 | % Change 1977/1972 |
|---|---|---|---|
| Heavy outerwear coats & jackets | | | |
| U.S. total | $ 397.3 | $ 311.8 | + 27.4% |
| Leading States: | | | |
| New York | 63.7 | 53.5 | + 19.1 |
| Washington | 41.6 | 18.1 | +129.8 |
| New Jersey | 36.6 | 21.3 | + 71.8 |
| Pennsylvania | 32.2 | 25.5 | + 26.3 |
| Missouri | 28.3 | 30.1 | - 6.0 |

(continued)

SHIPMENTS

Leading States

Value of Shipments of Men's & Boys' Sportswear by All Producers
By Leading States, 1972, 1977
(continued)

| | Value of Shipments 1977 | Value of Shipments 1972 | % Change 1977/1972 |
|---|---|---|---|
| Separate dress & sport trousers | | | |
| U.S. total | 1,308.3 | 1,388.1 | - 5.7% |
| Leading States: | | | |
| Texas | 246.7 | 273.0 | - 9.6 |
| New York | 167.6 | 180.8 | - 7.3 |
| Tennessee | 98.3 | 155.0 | - 36.6 |
| Mississippi | 78.7 | 145.7 | - 46.0 |
| Jeans & jean-cut casual slacks | | | |
| U.S. total | 1,962.8 | 737.6 | +166.1 |
| Leading States: | | | |
| Texas | 396.5 | na | |
| Tennessee | 342.5 | na | |
| Georgia | 182.0 | na | |
| Mississippi | 130.5 | na | |
| Virginia | 124.7 | na | |
| Dress & sport shirts, U.S. total | 1,344.6 | 1,069.5 | + 25.7 |
| Leading States: | | | |
| New York | 218.9 | 192.6 | + 13.6 |
| Tennessee | 158.3 | 112.1 | + 41.2 |
| California | 140.0 | 44.8 | +212.5 |
| Georgia | 137.7 | 120.3 | + 14.5 |
| Alabama | 119.1 | 112.5 | + 5.9 |
| Knit outerwear sport shirts* | | | |
| U.S. total | 809.0 | 382.7 | +111.4 |
| Leading States: | | | |
| Alabama | 126.6 | 10.9 | +1,061.5 |
| New York | 87.4 | 68.8 | + 27.0 |
| Pennsylvania | 80.2 | na | |
| North Carolina | 75.8 | 36.4 | +108.2 |
| Outerwear, n.e.c., U.S. total | 423.3 | 300.4 | + 40.9 |
| Leading States: | | | |
| New York | 63.3 | 47.5 | + 33.3 |
| Tennessee | 35.3 | 13.8 | +155.8 |
| Texas | 32.6 | na | |
| California | 30.9 | 21.6 | + 43.0 |
| Missouri | 30.6 | 19.3 | + 58.5 |

(continued)

SHIPMENTS

Leading States

Value of Shipments of Men's & Boys' Sportswear by All Producers
By Leading States, 1972, 1977
(continued)

| | Value of Shipments 1977 | Value of Shipments 1972 | % Change 1977/1972 |
|---|---|---|---|
| Sweaters, knit jackets & jerseys ** | | | |
| U.S. total | $ 555.5 | $ 473.8 | + 17.2% |
| Leading States: | | | |
| New York | 220.6 | 190.1 | + 16.0 |
| Pennsylvania | 110.4 | 108.2 | + 2.0 |
| New Jersey | 34.5 | 19.4 | + 77.8 |
| Knit outerwear sport shirts** | | | |
| U.S. total | 518.1 | 342.8 | + 51.1 |
| Leading States: | | | |
| North Carolina | 95.5 | 18.4 | +419.0 |
| Pennsylvania | 93.1 | na | |
| New York | 49.1 | 53.2 | - 7.7 |
| Other knit outerwear products** | | | |
| U.S. total | 689.7 | 445.0 | + 55.0 |
| Leading States: | | | |
| New York | 132.2 | 120.6 | + 9.6 |
| North Carolina | 81.6 | 7.5 | +988.0 |
| Wisconsin | 39.7 | 20.1 | + 97.5 |
| California | 19.8 | na | |

na = not available.
n.e.c. = not elsewhere classified
* Includes only knit outerwear sport shirts made in cut-and-sew shops
** Includes shipments of women's and children's products made in knitting mills.

Source: Based on the U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series.

PRODUCER PRICE TRENDS

In June 1982, the producer (wholesale) price of all apparel rose 3.8% from the 1981 average as monitored by the Bureau of Labor Statistics. Over the same time, men's apparel increased at a slightly higher 4.4% rate. The index for lightweight outer jackets moved up 3.8% in June 1982 compared with the 1981 average.

Producer Price Indexes of Selected Men's Sportswear Items
1979 - 1981, June 1982
(December 1977 = 100 unless otherwise indicated)

| | June 1982(p) | 1981 | 1980 | 1979 | % Change 1981/ 1980 | % Change 1981/ 1979 |
|---|---|---|---|---|---|---|
| All apparel (1967 = 100) | 193.0 | 186.0 | 172.4 | 160.4 | + 7.9% | +16.0% |
| Men's apparel (1967 = 100) | 220.2 | 210.9 | 200.4 | 136.0 | + 5.2 | +13.4 |
| Jean-cut casual slacks & jeans | na | 117.2 | 117.2 | 97.9 | -- | +19.7 |
| Denim jean-cut casual slacks & jeans (Dec. 1981 = 100) | 100.1 | na | na | na | | |
| Corduroy jean-cut casual slacks & jeans (Dec. 1981 = 100) | 100.0 | na | na | na | | |
| Knit pullover golf & polo shirts | 131.0 | na | na | 102.1 | | |
| Lightweight outer jackets | 140.6 | 135.4 | 122.5 | 105.8 | +10.5 | +28.0 |

Source: U. S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

U.S. imports of knit shirts increased 9.0% in value to $460.5 million in 1981 on a 12.3% rise in units to 11.5 million dozen. Cotton knit shirts imported into the U.S. paced the increase in this category with a 14.3% gain in value and a 22.7% hike in quantity.

The import value of trousers, slacks and shorts was up 17.0% to $476.5 million over the 1980 value of $407.2 million. Men's and boys' pants and shorts made with man-made fibers rose 35.4% in value and 33.6% in units.

According to the Bureau of Industrial Economics, the quantity of imports in the men's and boys' shirts and nightwear field represented 21.7% of the total available to U.S. consumers in 1981. In the men's and boys' separate trousers category, 20.4% of the total quantity available in 1981 was imported.

Imports

## Imports of Men's & Boys' Sportswear By Leading Countries of Origin, 1980, 1981

| | Quantity (Thous. Doz.) | | | Value* (Thous. $) | | |
|---|---|---|---|---|---|---|
| | 1981 | 1980 | % Change 1981/80 | 1981 | 1980 | % Change 1981/80 |
| Trousers, slacks & shorts, total | 7,568.1 | 6,613.6 | + 14.4% | $476,553 | $407,246 | + 17.0% |
| Wool, not knit | 170.3 | 160.6 | + 6.0 | 32,985 | 31,058 | + 6.2 |
| Korea | 58.0 | 56.7 | + 2.3 | 8,530 | 8,070 | + 5.7 |
| Italy | 32.7 | 27.0 | + 21.1 | 11,349 | 9,800 | + 15.8 |
| China | 19.5 | 16.5 | + 18.2 | 2,073 | 1,636 | + 26.7 |
| Cotton, not knit | 5,217.1 | 4,821.0 | + 8.2 | 345,216 | 303,531 | + 13.7 |
| Hong Kong | 2,043.8 | 2,240.8 | - 8.8 | 163,823 | 163,344 | + 0.3 |
| China | 794.4 | 696.0 | + 14.1 | 33,616 | 24,226 | + 38.8 |
| Philippine Republic | 305.5 | 179.1 | + 70.6 | 20,933 | 11,830 | + 76.9 |
| Man-made fibers, not knit | 2,180.7 | 1,632.0 | + 33.6 | 98,352 | 72,657 | + 35.4 |
| Taiwan | 1,315.3 | 809.7 | + 62.4 | 54,214 | 32,761 | + 65.5 |
| Mexico | 271.9 | 462.1 | - 41.1 | 12,868 | 19,054 | - 32.5 |
| China | 152.4 | 10.7 | +1,324.3 | 6,413 | 614 | +944.5 |
| Sweaters, total | 2,258.0 | 2,250.1 | + 0.3 | 171,267 | 147,853 | + 15.9 |
| Cashmere, wholly or in part | 17.3 | 19.4 | - 10.8 | 9,723 | 8,401 | + 15.7 |
| Hong Kong | 6.2 | 3.7 | + 67.6 | 2,718 | 1,320 | +105.9 |
| England | 5.5 | 8.2 | - 32.9 | 4,343 | 4,660 | - 6.8 |
| Sheep-like hair, except cashmere | 92.2 | 72.3 | + 27.5 | 10,114 | 7,084 | + 42.8 |
| Hong Kong | 49.9 | 37.5 | + 33.1 | 5,470 | 3,438 | + 59.1 |
| Wool, nspf, knit | 536.1 | 414.1 | + 29.5 | 59,226 | 42,821 | + 38.3 |
| Hong Kong | 228.7 | 197.0 | + 16.1 | 24,911 | 18,255 | + 36.5 |
| Cotton, knit | 116.8 | 116.0 | + 0.7 | 11,699 | 9,945 | + 17.6 |
| Hong Kong | 58.5 | 50.6 | + 15.6 | 6,377 | 4,587 | + 39.0 |
| Taiwan | 17.4 | 15.6 | + 11.5 | 1,383 | 988 | + 40.0 |
| Man-made fibers, knit | 1,495.6 | 1,628.3 | - 8.1 | 80,505 | 79,602 | + 1.1 |
| Korea | 568.7 | 604.5 | - 5.9 | 29,712 | 28,308 | + 5.0 |
| Taiwan | 552.3 | 704.7 | - 21.6 | 34,180 | 37,108 | - 7.9 |
| Knit shirts, total | 11,511.1 | 10,245.3 | + 12.3 | 460,551 | 422,673 | + 9.0 |
| Cotton | 5,852.1 | 4,770.8 | + 22.7 | 244,851 | 214,115 | + 14.3 |
| Hong Kong | 1,420.6 | 1,154.3 | + 23.1 | 75,511 | 63,544 | + 18.8 |
| Pakistan | 680.1 | 543.4 | + 25.1 | 5,359 | 4,071 | + 31.6 |
| China | 676.5 | 333.5 | +102.8 | 15,217 | 6,174 | +146.5 |
| Wool | 65.1 | 75.5 | - 13.8 | 7,895 | 8,581 | - 8.0 |
| Hong Kong | 48.7 | 56.6 | - 14.0 | 5,430 | 5,811 | - 6.6 |
| Man-made fibers | 5,593.9 | 5,399.0 | + 3.6 | 207,805 | 199,977 | + 3.9 |
| Korea | 2,496.7 | 1,899.0 | + 31.4 | 90,821 | 62,071 | + 46.3 |
| Taiwan | 1,499.3 | 1,912.3 | - 21.6 | 60,953 | 77,262 | - 21.1 |

(continued)

FOREIGN TRADE

## Imports

### Imports of Men's & Boys' Sportswear By Leading Countries of Origin, 1980, 1981 (continued)

| | Quantity (Thous. Doz.) | | | Value* (Thous. $) | | |
|---|---|---|---|---|---|---|
| | 1981 | 1980 | % Change 1981/80 | 1981 | 1980 | % Change 1981/80 |
| Other shirts, not knit, total | 15,756.4 | 14,980.7 | + 5.2% | $631,863 | $581,925 | + 8.6% |
| Sport shirts, cotton corduroy | 161.3 | 139.6 | + 15.5 | 9,800 | 8,847 | + 10.8 |
| China | 91.7 | 21.5 | +326.5 | 5,124 | 1,092 | +369.2 |
| Taiwan | 33.3 | 36.4 | - 8.5 | 2,184 | 2,344 | - 6.8 |
| Sport shirts, cotton, except corduroy | 4,757.2 | 4,871.7 | - 2.3 | 196,356 | 189,999 | + 3.3 |
| Hong Kong | 1,563.4 | 1,860.5 | - 16.0 | 75,101 | 81,989 | - 8.4 |
| Taiwan | 560.6 | 538.7 | + 4.1 | 21,401 | 19,965 | + 7.2 |
| Wool | 154.2 | 211.1 | - 27.0 | 12,197 | 17,317 | - 29.6 |
| Korea | 134.0 | 177.5 | - 24.5 | 9,878 | 13,702 | - 27.9 |
| Man-made fibers | 10,683.7 | 9,758.3 | + 9.5 | 413,510 | 365,762 | + 13.0 |
| Korea | 6,281.3 | 5,802.4 | + 8.2 | 224,339 | 203,270 | + 10.4 |
| Taiwan | 2,830.6 | 2,665.2 | + 6.2 | 117,171 | 105,900 | + 10.6 |

nspf = not specially provided for.

* Value stated is the C.I.F. (cost, insurance, freight) value, which represents the value of imports at the first port of entry into the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census, U.S. General Imports FT 135, December 1980, 1981.

## Exports

Trousers, slacks and shorts exports by U.S. manufacturers fell sharply to 2.6 million dozen in 1981, down 62.6% from the previous year, with an export value of $130.2 million, a 26.2% drop, according to the Bureau of the Census. Cotton denim jeans exports declined 83.1% in quantity and 41.0% in value.

Exported knit shirts rose 35.1% in quantity in 1981 to 2.2 million dozen but gained only a small 3.8% in value to $36.4 million compared with $35.1 million in 1980.

FOREIGN TRADE

## Exports

U.S. producers of men's and boys' shirts and nightwear exported 3.6% of their total product shipments in 1981, according to the Bureau of Industrial Economics, while producers of men's and boys' separate trousers exported 2.7% of their shipments.

### Exports of Men's & Boys' Sportswear
### By Leading Countries of Importation, 1980, 1981

| | Quantity (Thous. Doz.) | | | Value* (Thous. $) | | |
|---|---|---|---|---|---|---|
| | 1981 | 1980 | % Change 1981/80 | 1981 | 1980 | % Change 1981/80 |
| Trousers, slacks & shorts, total | 2,602.7 | 6,963.8 | - 62.6% | $130,162 | $176,272 | - 26.2% |
| Not knit, total | 2,208.2 | 6,415.7 | - 65.6 | 117,536 | 164,706 | - 28.6 |
| Trousers & slacks: | | | | | | |
| Denim, cotton, including brushed denim | 725.4 | 4,294.4 | - 83.1 | 66,332 | 112,492 | - 41.0 |
| Japan | 113.0 | 303.5 | - 62.8 | 13,924 | 19,791 | - 29.6 |
| Mexico | 112.9 | 2,495.2 | - 95.5 | 5,365 | 9,234 | - 41.9 |
| England | 111.1 | 319.1 | - 65.2 | 14,293 | 25,659 | - 44.3 |
| Cotton | 653.3 | 965.6 | - 32.3 | 23,925 | 29,015 | - 17.5 |
| Japan | 96.4 | 46.5 | +107.3 | 3,934 | 2,235 | + 76.0 |
| Sweden | 66.2 | 118.1 | - 43.9 | 2,139 | 1,649 | + 29.7 |
| France | 53.2 | 98.0 | - 45.7 | 1,919 | 1,537 | + 24.8 |
| Man-made fibers | 584.5 | 988.1 | - 40.8 | 20,073 | 19,018 | + 5.5 |
| Mexico | 303.0 | 689.0 | - 56.0 | 5,440 | 6,812 | - 20.1 |
| Shorts: | | | | | | |
| Cotton | 12.5 | 8.8 | + 42.0 | 368 | 344 | + 7.0 |
| Man-made fibers | 217.4 | 137.0 | + 58.7 | 5,849 | 3,238 | + 80.6 |
| Costa Rica | 84.7 | 25.2 | +236.1 | 2,287 | 651 | +251.3 |
| Dominican Republic | 69.1 | 27.6 | +150.3 | 2,023 | 677 | +198.8 |
| Trousers, slacks & shorts: | | | | | | |
| Wool | 15.1 | 21.8 | - 30.7 | 989 | 599 | + 65.1 |
| Trousers, slacks & shorts, knit, total | 394.5 | 548.1 | - 28.0 | 12,626 | 11,566 | + 9.2 |
| Trousers & slacks: | | | | | | |
| Cotton | 141.8 | 143.8 | - 1.4 | 5,518 | 6,247 | - 11.7 |
| North Antilles | 27.4 | 35.8 | - 23.5 | 622 | 1,064 | - 41.5 |
| Mexico | 22.6 | 19.2 | + 17.7 | 894 | 776 | + 15.2 |
| Man-made fibers | 174.9 | 358.2 | - 51.2 | 5,058 | 3,667 | + 37.9 |
| Mexico | 68.2 | 201.8 | - 66.2 | 1,513 | 1,342 | + 12.7 |

(continued)

## Exports of Men's & Boys' Sportswear By Leading Countries of Importation, 1980, 1981 (continued)

| | Quantity (Thous. Doz.) | | | Value* (Thous. $) | | |
|---|---|---|---|---|---|---|
| | 1981 | 1980 | % Change 1981/80 | 1981 | 1980 | % Change 1981/80 |
| Shorts: | | | | | | |
| Cotton | 31.6 | 25.2 | + 25.4% | $ 1,038 | $ 885 | + 17.3% |
| Dominican Republic | 7.2 | na | na | 140 | na | na |
| Man-made fibers | 46.3 | 20.9 | +121.5 | 1,012 | 767 | + 31.9 |
| Federal Republic of Germany | 24.6 | na | na | 282 | na | na |
| Shirts, total | 2,622.4 | 2,216.3 | + 18.3 | 52,071 | 50,231 | + 3.7 |
| Not knit, total | 463.7 | 618.1 | - 25.0 | 15,641 | 15,132 | + 3.4 |
| Sport shirts, cotton | 183.3 | 173.2 | + 5.8 | 4,837 | 4,278 | + 13.1 |
| Japan | 57.0 | 18.8 | +203.2 | 1,739 | 824 | +111.0 |
| Mexico | 56.8 | 33.4 | + 70.0 | 1,098 | 814 | + 34.9 |
| Sport shirts, man-made fibers | 173.8 | 351.8 | - 50.6 | 5,495 | 6,919 | - 20.6 |
| Mexico | 110.7 | 227.5 | - 51.3 | 2,856 | 3,485 | - 18.0 |
| Wool | 10.0 | 10.3 | - 2.9 | 879 | 740 | + 18.8 |
| Textile materials, not named above | 96.6 | 82.8 | + 16.7 | 4,430 | 3,195 | + 36.6 |
| Bermuda | 24.6 | 25.3 | - 2.8 | 840 | 879 | - 4.4 |
| Shirts, knit, total | 2,158.7 | 1,582.2 | + 35.1 | 36,430 | 35,099 | + 3.8 |
| Sport shirts, cotton | 503.4 | 420.1 | + 19.8 | 14,124 | 14,042 | + 0.6 |
| Canada | 101.8 | 29.2 | +248.6 | 1,503 | 447 | +236.2 |
| Mexico | 90.5 | 68.1 | + 32.9 | 3,051 | 2,674 | + 14.1 |
| T-shirts, excluding all-white, cotton | 1,256.8 | 924.4 | + 36.0 | 17,354 | 13,300 | + 30.5 |
| France | 341.2 | 108.2 | +215.3 | 2,899 | 1,070 | +170.9 |
| T-shirts, excluding all-white, man-made fibers | 245.9 | 154.5 | + 59.2 | 4,218 | 3,526 | + 19.6 |
| England | 42.1 | 12.6 | +234.1 | 689 | 448 | + 53.8 |
| Mexico | 29.9 | 7.2 | +315.3 | 531 | 153 | +247.1 |
| Federal Republic of Germany | 27.4 | 10.0 | +174.0 | 293 | 116 | +152.6 |
| Wool | 8.3 | 14.0 | - 40.7 | 734 | 754 | - 2.6 |
| Textile materials, not named above | 144.3 | 85.2 | + 69.4 | 5,411 | 3,477 | + 55.6 |
| Federal Republic of Germany | 32.3 | na | na | 1,001 | na | na |

(continued)

FOREIGN TRADE

Exports

Exports of Men's & Boys' Sportswear
By Leading Countries of Importation, 1980, 1981
(continued)

| | Quantity (Thous. Doz.) | | | Value* (Thous. $) | | |
|---|---|---|---|---|---|---|
| | 1981 | 1980 | % Change 1981/80 | 1981 | 1980 | % Change 1981/80 |
| Sport shirts & sweatshirts of man-made fibers, knit | 592.9 | 370.1 | + 60.2% | $22,187 | $13,594 | + 63.2% |
| England | 164.9 | 34.7 | +375.2 | 5,408 | 1,478 | +265.9 |
| Federal Republic of Germany | 141.8 | 44.5 | +218.6 | 4,029 | 1,764 | +128.4 |
| Sweaters, knit, total | 78.2 | 81.4 | - 3.9 | 4,330 | 3,646 | + 18.8 |
| Wool | 11.3 | 6.0 | + 88.3 | 947 | 580 | + 63.3 |
| Cotton | 24.9 | 25.2 | - 1.2 | 1,062 | 899 | + 18.1 |
| Man-made fibers | 42.0 | 50.2 | - 16.3 | 2,321 | 2,167 | + 7.1 |
| Sweatshirts, cotton, knit | 2,189.4 | 3,272.7 | - 33.1 | 73,487 | 90,615 | - 18.9 |

na = not available
* The export value is equivalent to the f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of export.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410,
December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to Census Bureau estimates of the U.S. population in 1981 (based on 1980 census data), males aged 25-34 accounted for the largest percentage (17.3%) of the adult male population 15 years of age or older. However, population projections made by the Census Bureau (based on 1970 census data) indicate that by 1990, men in the 35-44 year old age bracket will increase some 60% and constitute 15.2% of the male population compared with a 17.2% share for the 25-34 year olds. By the year 2000, the 25-35 year old age group will slide to 13.5% of males, to be surpassed not only by the 35-44 year olds (16.0% of all males) but also by those from 45-59 years of age (18.9%) and those 60 years or older (13.9%).

A new Census Bureau report on population projections based on 1980 census information, which may cause some changes in the data listed in the table below, is not scheduled to be published until mid-1983.

Male Population of the U.S., 1980 & Projections to 2000*
(In Millions)

| | 1981 | 1990 | 2000 | % Change 2000/1981 | Percent of Total Males 1981 | 1990 | 2000 |
|---|---|---|---|---|---|---|---|
| U.S., total | 111.4 | 118.0 | 126.1 | + 13.2% | 100.0% | 100.0% | 100.0% |
| Under 15 years | 26.2 | 28.3 | 29.2 | + 11.4 | 23.5 | 24.0 | 23.1 |
| 15 years & older | 85.2 | 89.7 | 96.9 | + 13.7 | 76.5 | 76.0 | 76.9 |
| 15-19 years | 10.4 | 8.5 | 10.0 | - 3.8 | 9.3 | 7.2 | 7.9 |
| 20-24 years | 10.9 | 8.8 | 8.3 | - 23.8 | 9.8 | 7.5 | 6.6 |
| 25-34 years | 19.3 | 20.3 | 17.0 | - 11.9 | 17.3 | 17.2 | 13.5 |
| 35-44 years | 13.0 | 17.9 | 20.2 | + 55.4 | 11.7 | 15.2 | 16.0 |
| 45-59 years | 16.4 | 17.3 | 23.8 | + 45.1 | 14.7 | 14.7 | 18.9 |
| 60 years & older | 15.3 | 16.9 | 17.5 | + 14.4 | 13.7 | 14.3 | 13.9 |
| Median age (years) | 29.1 | 31.6 | 34.1 | + 17.2 | | | |

(p) = preliminary
* These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level. The projections were produced in 1977 and are subject to revision based on the 1980 Census of Population results.

Source: U.S. Bureau of the Census,
Current Population Reports P-25 Nos. 704, 917

The following table covers estimates on the current adult male population (18-74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health, Education and Welfare (now renamed the Department of Health and Human Services) and the U.S. Census Bureau.

Close to 2.5 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch to six feet one inch height range.

Distribution of the U.S. Male Population by Height/Weight Groups, 1982
(Numbers in Thousands)

| | Total | Under 5'6" | 5'6"-5'8" | 5'9"-6'1" | 6'2" & Over |
|---|---|---|---|---|---|
| Total, 18-74 years | 75,274 | 10,237 | 27,023 | 35,529 | 2,485 |
| Percent | 100.0% | 13.6% | 35.9% | 47.2% | 3.3% |
| Weight: | | | | | |
| Under 150 lbs. | 16,937 | 5,119 | 6,925 | 4,742 | 151 |
| Percent | 22.5% | 6.8% | 9.2% | 6.3% | 0.2% |
| 150-179 lbs. | 31,464 | 3,764 | 13,323 | 14,001 | 376 |
| Percent | 41.8% | 5.0% | 17.7% | 18.6% | 0.5% |

(continued)

Distribution of the U.S. Male Population by Height/Weight Groups, 1982
(Numbers in Thousands)
(continued)

| | Total | Under 5'6" | 5'6"-5'8" | 5'9"-6'1" | 6'2" & Over |
|---|---|---|---|---|---|
| 180-199 lbs. | 14,829 | 903 | 4,516 | 8,732 | 678 |
| Percent | 19.7% | 1.2% | 6.0% | 11.6% | 0.9% |
| 200-229 lbs. | 9,033 | 376 | 1,882 | 6,022 | 753 |
| Percent | 12.0% | 0.5% | 2.5% | 8.0% | 1.0% |
| 230 lbs. & over | 3,011 | 75 | 377 | 2,032 | 527 |
| Percent | 4.0% | 0.1% | 0.5% | 2.7% | 0.7% |

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

The National Sporting Goods Association issues an annual report on projected U.S. retail sales of sports apparel and equipment based on purchases made by a panel of 80,000 households nationwide. Projected sales in the table below include active sportswear sales for both men and women, as the NSGA did not separate the data by sex.

For 1981 and 1982, projected sales are for the October through September period.

Retail Sales of Active Sportswear 1981
& Projected Retail Sales for 1982
(Millions of Dollars)

| | Estimated 1981 | Projected 1982 | Average Price 1981 |
|---|---|---|---|
| Athletic socks | $ 267.6 | $ 281.0 | $ 1.74 |
| Bathing suits | 860.0 | 946.0 | 19.89 |
| Golf clothing | 198.0 | 208.0 | na |
| Down or fiber filled parkas | 351.7 | 376.0 | 62.10 |
| Elastic waist shorts | 334.0 | 367.0 | 7.77 |
| Skiwear | 257.7 | 271.0 | na |
| Sweatshirts | 191.5 | 211.0 | 10.22 |
| Tennis clothing | 150.1 | 158.0 | na |
| Down or fiber filled vests | 238.0 | 243.0 | 32.78 |
| Warm-up suits | 352.2 | 380.0 | 26.99 |

Source: National Sporting Goods Association, The Sporting Goods Market in 1982.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

## Active Sportswear

The 1977 Census of Retail Trade contains the latest official information on men's active sportswear sales in specified outlet types. Only stores with payrolls are included in the merchandise line reports and not all store types were required to break down their sales by merchandise category.

In 1977, active sportswear sales in department stores accounted for over half of reported men's activewear sales. Sporting goods stores accounted for an additional 18.7% of sales. Since 1977, many sporting goods stores have increased their efforts to sell soft goods.

Reported Sales of Men's Active Sportswear by Store Type, 1977
(Includes only stores with payrolls)

| | Stores Reporting Sales | | Sales | |
|---|---|---|---|---|
| | Number* | % of Total | Mil. $ | % of Total |
| Total reported | 29,379 | 100.0% | $ 949.9 | 100.0% |
| Department stores** | 6,494 | 22.1 | 532.5 | 56.1 |
| Men's & boys' wear stores | 8,251 | 28.1 | 104.8 | 11.0 |
| Family clothing stores | 6,535 | 22.2 | 90.5 | 9.5 |
| Sporting goods stores*** | 3,849 | 13.1 | 178.4 | 18.7 |
| Mail order houses | 3,285 | 11.2 | 17.6 | 1.9 |
| All other retail outlets | 965 | 3.3 | 26.1 | 2.7 |

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

***Reported as sales of men's and boys' clothing, except footwear.

Percent of Total Store Sales Accounted For by Men's Active Sportswear Sales in Key Store Types, 1977

| | Total Store Sales (Mil. $) | % of Total Sales Accounted For By Men's Active Sportswear Sales |
|---|---|---|
| Department stores** | $ 76,909.4 | 0.7% |
| Men's & boys' wear stores | 6,838.8 | 1.5 |
| Family clothing stores | 7,883.6 | 1.1 |
| Sporting goods stores | 4,171.9 | 4.3 |

**See footnote in the table above.

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, Merchandise Line Sales RC 77-L.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

Personal interviews with a nationally-representative sample of 1,004 men 18 years of age and over, done by the Roper Organization in 1980 for Virginia Slims cigarettes, found that 71% of men are involved regularly in some form of sports activity. Thirty percent say they are very active participants in some sort of physical exercise.

A fall 1980 survey conducted among Playboy Magazine subscribers revealed that 92% of the respondents participated in one or more sports activities in the year prior to the survey. In addition, 29% of all respondents planned to participate in a new sport during 1981. On average, each respondent owns three pairs of athletic shorts, two sweatshirts, one warm-up suit and seven pairs of sport/sweat socks.

Consumer purchases of active sportswear for both men and women in 1982 are projected to jump 13%-15%, according to a September 1981 Celanese Fibers survey of the expectations of 93 sportswear buyers in major department and specialty stores located in 20 large U.S. markets. These buyers expect that their active sportswear merchandise mix will contain approximately 75% spectator activewear versus 25% authentic (functional) activewear in 1982. This large percentage of inventory given over to spectator active sportswear reinforces the popular view that even those men and women who do not participate in sports activity want to look as if they do.

Increasingly, non-functional activewear will be worn as informal wear or leisurewear in a variety of different settings. Some of the potential uses of active sportswear are cited in the following table, with the percentage of respondents who believe their use will accelerate in the future.

Activities Where Active Sportswear Will be Worn in the Future

| | Warm-up Suits & Sweatshirts | Running/ Jogging Apparel | Tennis & Other Racquet Wear | Beach & Swimwear | Knit tops/ Golf Shirts |
|---|---|---|---|---|---|
| Working/daytime wear: | | | | | |
| At home | 74% | 43% | 15% | 11% | 72% |
| At the office | * | 7 | * | * | 26 |
| Informal lunch | 48 | 22 | 33 | 9 | 74 |
| After work wear: | | | | | |
| Relaxing around home | 91 | 70 | 43 | 26 | 67 |
| At the movies | 48 | 26 | 20 | 11 | 76 |
| Going shopping | 78 | 41 | 30 | 11 | 72 |
| At cocktail hour | 33 | 15 | 17 | 9 | 67 |

(continued)

## RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

### Active Sportswear

Activities Where Active Sportswear Will be Worn in the Future

| | Warm-up Suits & Sweatshirts | Running/ Jogging Apparel | Tennis & Other Racquet Wear | Beach & Swimwear | Knit tops/ Golf Shirts |
|---|---|---|---|---|---|
| Weekend wear: | | | | | |
| At the beach | 46% | 61% | 41% | na | 61% |
| At a barbeque/cookout | 78 | 54 | 52 | 33 | 76 |
| Traveling | 70 | 50 | 33 | 13 | 67 |

* Less than 5%
na = not applicable.

Source: Celanese Fibers Marketing Co., Active Sportswear: A major retail classification in the 1980's, Sept. 1981.

### Men's Jeans & Casual Slacks

Sales of men's and boys' jeans, the largest dollar volume classification in the men's and boys' apparel field, approached the $4.5 billion mark in 1981, up 12.5% from $4.0 billion in 1980 (Daily News Record June 3, 1982).

Unit sales of men's, women's and children's jeans increased 3% in 1981 to 605 million pairs compared with 586 million in 1980, according to Jeanswear Communications, an industry trade group. Men's jeans sales in units inched upward only 2%. Denim jeans accounted for 84% of all men's jeans sold, corduroy jeans for 12% and other fabrics for the remaining 4%, according to this same source.

Jeans manufacturers are looking to stretch jeans to instill new life into the industry, which many analysts feel has reached the mature stage. In a November 1981 Gallup survey of 1,000 men and women, 45.9% of those aged 35-44, the prime target for stretch jeans, indicated they already have bought a pair or intend to do so within 12 months. Over half of all respondents, who either bought or expect to buy stretch jeans, said the comfort and flexibility of these jeans is their major motivation behind the purchase.

As the sale of jeans slow down, casual slack sales are expected to heat up. The conventional thinking in the slacks industry is that as men grow older, they grow tired of wearing jeans to every occasion and look for a change. According to NPD Research, there were 58.5 million pairs of casual pants sold in 1980, 3.7% more than in 1979. Popular fabrications for casual slacks include sheetings, twills, chinos, canvases and chintz-finished poplins.

In 1977, reported sales of men's jeans and casual slacks totaled $2.8 billion. This total only includes sales in stores which were required to break down their sales by merchandise classification and, within this grouping, only stores with payrolls. Department stores and men's and boys' wear stores both reported over $1 billion in jean and casual slack sales. Combined, they accounted for almost three quarters of reported sales in the category.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Men's Jeans & Casual Slacks

Reported Sales of Specified Men's Jeans & Casual Slacks
By Store Type, 1977
(Includes only stores with payrolls)

| | Stores Reporting Sales | | Sales | |
|---|---|---|---|---|
| | Number* | % of Total | Mil. $ | % of Total |
| Men's jeans & casual slacks | 42,493 | 100.0% | $ 2,791.1 | 100.0% |
| Department stores** | 7,754 | 18.3 | 1,070.9 | 38.4 |
| Men's & boys' wear stores | 16,013 | 37.7 | 1,003.7 | 36.0 |
| Family clothing stores | 13,211 | 31.1 | 616.1 | 22.1 |
| Mail order houses | 3,646 | 8.6 | 59.6 | 2.1 |
| All other outlets | 1,815 | 4.2 | 39.8 | 1.4 |

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-1.

Percent of Total Store Sales Accounted For by
Men's Jeans & Casual Slack Sales in Key Store Types, 1977

| | Total Store Sales (Mil. $) | % of Total Sales Accounted For By Men's Jeans & Casual Slack Sales |
|---|---|---|
| Department stores** | $ 76,909.4 | 1.4% |
| Men's & boys' wear stores | 6,838.8 | 14.7 |
| Family clothing stores | 7,883.6 | 7.8 |

** See footnote for the previous table.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-1.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Other Specified Men's Sportswear

Reported Sales of Other Specified Men's Sportswear Items
By Store Type, 1977
(Includes only stores with payrolls)

| | Stores Reporting Sales | | Sales | |
|---|---|---|---|---|
| | Number* | % of Total | Mil. $ | % of Total |
| Men's dress & sport shirts (woven) | 42,404 | 100.0% | $2,625.2 | 100.0% |
| Department stores** | 7,702 | 18.2 | 1,336.3 | 50.9 |
| Men's & boys' wear stores | 16,894 | 39.8 | 798.4 | 30.4 |
| Family clothing stores | 12,578 | 29.7 | 412.2 | 15.7 |
| Mail order houses | 3,610 | 8.5 | 47.8 | 1.8 |
| All other outlets | 1,620 | 3.8 | 30.5 | 1.2 |
| Men's novelty shirts/knit shirts | 23,241 | 100.0 | 712.1 | 100.0 |
| Department stores** | 3,893 | 16.7 | 373.9 | 52.5 |
| Men's & boys' wear stores | 9,490 | 40.8 | 223.4 | 31.4 |
| Family clothing stores | 6,575 | 28.3 | 100.9 | 14.2 |
| Mail order houses | 3,283 | 14.1 | 13.9 | 1.9 |
| Men's sweaters | 32,829 | 100.0 | 689.1 | 100.0 |
| Department stores** | 5,737 | 17.5 | 308.2 | 44.7 |
| Men's & boys' wear stores | 13,842 | 42.2 | 259.3 | 37.6 |
| Family clothing stores | 9,069 | 27.6 | 100.4 | 14.6 |
| Mail order houses | 3,345 | 10.2 | 11.3 | 1.6 |

* and ** See footnotes for the previous tables.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales RC 77-1.

Percent of Total Store Sales Accounted For by Men's Sportswear
Sales in Key Store Types, 1977

| | Total Store Sales (Mil. $) | % of Total Sales Accounted For By: Dress & Sport Shirts | Novelty & Knit Shirts | Sweaters |
|---|---|---|---|---|
| Department stores** | $ 76,909.4 | 1.7% | 0.5% | 0.4% |
| Men's & boys' wear stores | 6,838.8 | 11.7 | 3.3 | 3.8 |
| Family clothing stores | 7,883.6 | 5.2 | 1.3 | 1.3 |

** See footnote for the table on page 30.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-1.

RETAIL SALES BY STORE TYPE

## Men's Wear Stores

### Number of Stores & Sales of Men's & Boys' Wear Stores 1978-1981

| | 1981 | 1980 | 1979 | 1978 | % Change 1981/1980 | % Change 1981/1978 |
|---|---|---|---|---|---|---|
| Total sales (mil. $) | $7,786 | $7,830 | $7,830 | $7,503 | - 0.6% | + 3.8% |
| No. of stores* | na | na | 18,517 | 19,866 | -- | -- |

* Includes only stores with paryolls.

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-81S;
County Business Patterns, 1978, 1979.

Men's sportswear sales in men's wear stores rose 3.8% in 1981 compared with 1980, a smaller increase than the overall 5.3% gain registered for the entire store, according to the Menswear's Retailers of America Annual Business Survey. Active sportswear was the hottest sportswear category in 1981, recording a median rise of 18.5% over the previous year. Casual slacks followed with a typical 14.8% sales increase, well over the median sales increase for the entire store.

For the first six months of 1982, sales in men's wear stores with annual sales of at least $1 million were up a median 5.6% over the same 1981 period. Men's wear stores with sales under $1 million did not fare as well. Stores with annual sales of $500,000 to $1 million posted a typical 2.7% sales rise. Stores in the $250,000 to $500,000 range gained 3.5% in sales while stores under $250,000 recorded flat sales in the January-June 1982 period compared with a year ago (Daily News Record, July 27, 1982).

### Selected Merchandising & Operating Results in Men's Wear Stores, 1981 (Median Results)

| | Sales | | | Markdowns, | Number |
|---|---|---|---|---|---|
| | % Change From Last Year (60)* | % To Total Store (71)* | % Within Department (71)* | % of Sports-wear Sales (37)* | of Stock Turns (45)* |
| Total store | + 5.3% | 100.0% | -- | 12.9%** | 1.9 |
| Sportswear, total | + 3.8 | 23.1 | 100.0% | 12.5 | 2.1 |
| Sport shirts | + 0.5 | 8.2 | 35.2 | 12.9 | 2.7 |
| Sweaters | + 3.8 | 3.6 | 16.3 | 13.2 | 2.4 |
| Actionwear | + 18.5 | 1.0 | 4.0 | 14.8 | 2.2 |
| Casual slacks | + 14.8 | 4.1 | 16.3 | 12.2 | 2.1 |
| Jeans | + 2.9 | 3.3 | 15.2 | 9.7 | 1.5 |
| Jackets & heavy outerwear | - 2.8 | 4.1 | 16.3 | 14.0 | 2.0 |
| Coordinated leisurewear | - 9.8 | 0.8 | 2.3 | 19.7 | 2.2 |

* Number in parenthesis refers to the number of reporting firms in each category.
** Represents median markdown percentage of the total store.

Source: Menswear Retailers of America,
1981 Annual Business Survey.

RETAIL SALES BY STORE TYPE

Department Stores

Number of Stores & Retail Sales of Department Stores, 1978-1981

| | 1981 | 1980 | 1979 | 1978 | 1981/80 | 1981/78 |
|---|---|---|---|---|---|---|
| Total sales (mil. $) | $103,609 | $94,705 | $90,006 | $84,496 | + 9.4% | + 22.6% |
| No. of stores | na | na | 9,013 | 8,546 | -- | -- |

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-81S;
County Business Patterns, 1978, 1979.

Sales of men's sweaters and vests in department stores with annual sales over $1 million rose a median 17.5% in 1980, according to the National Retail Merchants Association, While the typical sales increase for the entire upstairs store was 3.1% and all adult male apparel sales gained 5.7% from their 1979 level, the sportswear categories tracked in the NRMA report exceeded these sales advances.

Men's active sportswear sales gaine_ 15.2% over 1979 sales in these department stores. Casual jackets and slacks also registered a median double-digit gain, of 13.4%, and men's sport shirts sales were up 7.9%.

The covered sportswear categories had median stock turn and sales per square foot figures higher than those for the whole upstairs store and all adult male apparel.

Merchandising & Operating Results in Department Stores
With Sales Over $1 Million
(Median Results)

| | Total Upstairs Store (125)* | Adult Male Apparel (121)* | Casual Wear-Jackets & Slacks (60)* | Sport Shirts (33)* | Sweaters & Vests (24)* | Active Sportswear (47)* |
|---|---|---|---|---|---|---|
| Net sales, % change from last year | 3.1% | 5.7% | 13.4% | 7.9% | 17.5% | 15.2% |
| Sales, % to total store | 90.8 | 11.9 | 2.0 | 1.7 | 0.8 | 0.8 |
| Gross margin, % of sales, incl. cash discounts | 42.3 | 42.2 | 41.3 | 45.7 | 47.4 | 44.1 |

(continued)

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results in Department Stores
With Sales Over $1 Million
(Median Results)

| | Total Upstairs Store (125)* | Adult Male Apparel (121)* | Casual Wear-Jackets & Slacks (60)* | Sport Shirts (33)* | Sweaters & Vests (24)* | Active Sportswear (47)* |
|---|---|---|---|---|---|---|
| Markdowns, retail, % of sales | 12.3% | 13.0% | 14.0% | 13.1% | 13.0% | 11.8% |
| Sales promotion, % of sales | 3.0 | 2.7 | 2.7 | 3.5 | na | 3.8 |
| Number of stock turns (times) | 2.7 | 2.7 | 2.8 | 4.1 | 4.6 | 3.3 |
| $ sales per sq. ft. of selling space (main or largest selling unit) | $ 93.1 | $ 135.5 | $ 141.3 | $ 170.5 | na | $ 148.3 |

* Number in parenthesis refers to the number of reporting firms in each category.

Source: National Retail Merchants Association,
"Merchandising & Operating Results of 1980"

ADVERTISING

Percent of Year's Total Retailers' Newspaper Ad Linage Done Each Month
1981

| | Jan. | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Slacks | 3.8% | 7.1% | 6.8% | 8.8% | 8.5% | 13.4% | 5.0% | 12.1% | 6.5% | 7.7% | 9.1% | 11.2% | 100.0% |
| Sportswear & accessories | 5.2 | 5.8 | 6.3 | 6.9 | 7.2 | 13.5 | 5.0 | 7.9 | 5.9 | 8.9 | 12.2 | 15.2 | 100.0 |

Source: The Advertising Checking Bureau
Neustadt Reports Div. based on newspaper advertising
in Chicago, Philadelphia, Cincinnati, Dallas, Cleveland,
Los Angeles and Washington, D.C.

CONSUMER PRICE TRENDS

In the first six months of 1982, retail prices of men's apparel rose an average 4.3% compared with the same 1981 period, and 0.7% over the 1981 yearly average. Average prices of men's dungarees, jeans and trousers was up 4.6% in the first six months of 1982 from the January through June 1981 period while men's shirts increased 3.2% and men's coats and jackets only 1.0% over the same time period.

Consumer Price Index of Specified Men's Sportswear Items
(Dec. 1977 = 100)

| | January - June | | Annual Averages | | % Change |
|---|---|---|---|---|---|
| | 1982 | 1981 | 1981 | 1980 | 1981/1980 |
| Apparel commodities less footwear (1967 = 100) | 175.3 | 171.8 | 174.0 | 167.8 | + 3.7% |
| Men's apparel | 114.5 | 109.7 | 111.7 | 106.0 | + 5.4 |
| Coats & jackets | 98.1 | 97.1 | 98.7 | 97.4 | + 1.3 |
| Shirts | 120.6 | 116.9 | 118.7 | 113.7 | + 4.4 |
| Dungarees, jeans & trousers | 109.2 | 104.4 | 106.3 | 100.3 | + 6.0 |

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following tables on specified men's sportswear items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. All the tables in this section come from this source, and are indicative of retail sales patterns nationwide.

Percent of Panel Households Purchasing Specified Men's Sportswear By Month, 1981

| | Any Men's Apparel | Shirts, Sweaters & Other Tops | Pants, Jeans Slacks & Shorts | Swimwear & Sweatsuits |
|---|---|---|---|---|
| January | 23.1% | 10.7% | 7.0% | 0.3% |
| February | 19.6 | 8.8 | 5.9 | 0.3 |
| March | 20.5 | 9.2 | 7.0 | 0.2 |
| April | 23.0 | 10.5 | 9.8 | 0.4 |
| May | 21.1 | 10.3 | 8.6 | 0.7 |
| June | 28.0 | 14.9 | 11.5 | 1.3 |
| July | 23.2 | 11.8 | 9.3 | 1.2 |
| August | 23.4 | 9.9 | 9.6 | 0.5 |
| September | 19.3 | 8.6 | 7.0 | 0.3 |
| October | 22.9 | 10.6 | 7.4 | 0.2 |
| November | 27.7 | 16.0 | 7.8 | 0.4 |
| December | 39.1 | 25.0 | 13.1 | 0.3 |
| Average | 24.2 | 12.2 | 8.7 | 0.5 |

Source: National Panel Diary, quoted in 1983 Newspaper Advertising Planbook, Newspaper Advertising Bureau

Men's Leisure Suits & Jackets

Purchases of Leisure Suits & Jackets by Store Type, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Department stores | 28.4 | 36.4 |
| National chains | 21.9 | 13.5 |
| Specialty stores | 18.7 | 30.5 |
| Discount stores | 18.1 | 7.3 |
| Other stores, incl. factory outlets | 12.9 | 12.3 |

Purchases of Leisure Suits & Jackets by Price Points, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Less than $10.00 | 15.1 | 3.1 |
| $10.00 - 19.99 | 27.6 | 12.1 |
| $20.00 - 29.99 | 21.0 | 16.3 |
| $30.00 - 49.99 | 15.6 | 19.8 |
| $50.00 & over | 20.7 | 48.7 |

(continued)

Men's Leisure Suits & Jackets

| | Jan. | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Units | 0.9% | 7.5% | 9.0% | 15.9% | 4.2% | 6.4% | 11.7% | 4.4% | 9.0% | 9.0% | 10.5% | 11.5% | 100.0% |
| Dollars | 0.9 | 4.6 | 4.5 | 14.8 | 3.0 | 6.9 | 6.3 | 3.1 | 13.6 | 12.8 | 13.9 | 15.6 | 100.0 |

Source of above tables: NPD Research.

Dress & Casual Slacks

Sales of dress and casual slacks averaged $16.20 during the 12-month period between October 1980 and September 1981, 9% higher than the $14.87 average for the preceding 12-month period, according to NPD Research.

Purchases of Dress & Casual Slacks by Style

| | Percent of Units Sold | |
|---|---|---|
| | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 |
| Total | 100.0% | 100.0% |
| Straight legs | 72.4 | 67.9 |
| Flares | 20.6 | 27.4 |
| Tapered legs | 2.0 | 1.4 |
| Bell bottoms | 1.3 | 2.2 |
| Other slacks | 3.7 | 1.1 |

Purchases of Dress & Casual Slacks by Store Type

| | Percent of Units Sold | | Average Price Paid | |
|---|---|---|---|---|
| | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 |
| Total | 100.0% | 100.0% | $ 16.20 | $ 14.87 |
| Department stores | 31.6 | 31.0 | 17.91 | 16.00 |
| National chains | 24.8 | 21.2 | 13.80 | 12.44 |
| Specialty stores | 19.3 | 22.3 | na | na |
| Discount stores | 15.4 | 15.5 | na | na |
| Other stores, incl. factory outlets | 8.9 | 10.0 | 15.19 | 11.52 |

na = not available.

Purchases of Dress & Casual Slacks by Price Point

| | Percent of Units Sold | |
|---|---|---|
| | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 |
| Total | 100.0% | 100.0% |
| Under $8.00 | 10.8 | 16.1 |
| $8.00 - 12.99 | 29.7 | 35.1 |
| $13.00 - 17.99 | 26.4 | 23.2 |
| $18.00 & over | 33.1 | 25.6 |

Source of above tables: NPD Research.

CONSUMER BUYING HABITS

## Men's Jeans

### Purchases by Jeans Type

| | Percent of Units Sold 1981 | 1980 |
|---|---|---|
| Total | 100.0% | 100.0% |
| Straight leg | 53.4 | 44.8 |
| Flares | 31.2 | 41.0 |
| Bell bottoms | 4.6 | 6.8 |
| Tapered | 2.0 | 1.5 |
| Other | 8.8 | 5.9 |

### Purchases of Men's Jeans by Store Type

| | Percent of Units Sold 1981 | 1980 | Average Price Paid 1981 | 1980 |
|---|---|---|---|---|
| Total | 100.0% | 100.0% | $13.72 | $12.90 |
| Department stores | 22.0 | 20.4 | 16.18 | 14.77 |
| National chains | 22.7 | 23.8 | 12.38 | 11.72 |
| Discount stores | 23.3 | 21.6 | 10.87 | 10.33 |
| Specialty stores | 20.2 | 22.8 | 16.35 | 14.93 |
| Other stores, incl. factory outlets | 11.8 | 11.4 | 13.38 | 13.08 |

### Purchases of Men's Jeans by Price Point

| | Percent of Units Sold 1981 | 1980 |
|---|---|---|
| Total | 100.0% | 100.0% |
| Less than $10.00 | 24.3 | 30.2 |
| $10.00 - 14.99 | 43.0 | 44.9 |
| $15.00 - 24.99 | 28.0 | 21.7 |
| $25.00 & over | 4.7 | 3.2 |

Source of above tables: NPD Research

## Men's Sport Shirts

Knit shirts accounted for 52% of the sport shirt unit purchases made by the members of the NPD Consumer Panel from October 1980 to September 1981. In terms of dollars, knit sport shirts held a 51% share of the market compared with 49% for woven shirts.

CONSUMER BUYING HABITS

## Men's Sport Shirts

### Purchases of Sport Shirts by Fabric

| | Percent of Units Sold | |
|---|---|---|
| | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 |
| Total | 100.0% | 100.0% |
| Polyester/cotton | 45.0 | 43.0 |
| All cotton | 20.0 | 20.0 |
| Cotton/polyester | 13.0 | 12.0 |
| All polyester | 8.0 | 9.0 |
| All nylon | 2.0 | 2.0 |
| Other fabrics | 9.0 | 9.0 |
| Unreported | 3.0 | 5.0 |

### Purchases of Sport Shirts by Store Type

| | Percent of Units Sold | | Average Price Paid |
|---|---|---|---|
| | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 | Oct. 1980-Sept. 1981 |
| Total | 100.0% | 100.0% | na |
| Discount stores | 27.0 | 25.0 | $ 6.46 |
| National chains | 26.0 | 24.0 | 9.08 |
| Department stores | 25.0 | 25.0 | 11.55 |
| Specialty stores | 13.0 | 15.0 | 12.29 |
| Other stores, incl. factory outlets | 9.0 | 11.0 | na |

na = not available

### Purchases of Sport Shirts by Price Points

| | Percent of Units Sold | |
|---|---|---|
| | Oct. 1980-Sept. 1981 | Oct. 1979-Sept. 1980 |
| Total | 100.0% | 100.0% |
| Less than $5.00 | 23.3 | 25.6 |
| $5.00 - 9.99 | 40.4 | 42.0 |
| $10.00 - 14.99 | 22.1 | 19.4 |
| $15.00 - 19.99 | 9.0 | 8.0 |
| $20.00 & over | 5.2 | 5.0 |

(continued)

## Men's Sport Shirts

### Purchases of Sport Shirts by Sleeve Length

| | Oct. 1980 - Sept. 1981 | |
|---|---|---|
| | Units | Dollars |
| Total | 100.0% | 100.0% |
| Long/ 3-quarter length | 44.9 | 48.4 |
| Short | 52.8 | 50.2 |
| Sleeveless | 2.7 | 1.4 |

Source of above tables: NPD Research.

## Men's Polo Shirts

### Purchases of Polo Shirts by Store Type, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Discount stores | 27.7 | 17.0 |
| Department stores | 23.5 | 30.5 |
| National chains | 21.8 | 22.5 |
| Specialty stores | 14.0 | 17.9 |
| Other stores, incl. factory outlets | 13.0 | 12.4 |

### Purchases of Polo Shirts by Price Points, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Less than $4.00 | 21.7 | 6.4 |
| $4.00 - 7.99 | 32.0 | 21.8 |
| $8.00 - 15.99 | 34.7 | 44.8 |
| $16.00 & over | 11.6 | 27.0 |

### Purchases of Polo Shirts by Month, 1981

| | Jan. | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Units | 4.1% | 4.0% | 6.3% | 9.9% | 11.8% | 17.1% | 13.2% | 7.7% | 4.8% | 4.6% | 5.7% | 10.8% | 100.0% |
| Dollars | 3.5 | 3.9 | 6.4 | 10.9 | 10.0 | 16.9 | 11.0 | 6.4 | 4.3 | 5.2 | 6.5 | 15.0 | 100.0 |

Source of above tables: NPD Research.

CONSUMER BUYING HABITS

## Men's Sweaters

### Purchases of Sweaters by Store Type

| | Percent of Units Sold | |
|---|---|---|
| | 1981 | 1980 |
| Total | 100.0% | 100.0% |
| Department stores | 35.4 | 32.6 |
| Specialty stores | 19.4 | 19.3 |
| Discount stores | 18.2 | 19.1 |
| National chains | 13.6 | 20.8 |
| Other stores, incl. factory outlets | 13.4 | 8.2 |

### Purchases of Sweaters by Price Points

| | Oct. 1980 - Sept. 1981 | |
|---|---|---|
| | Units | Dollars |
| Total | 100.0% | 100.0% |
| Less than $10.00 | 27.6 | 32.5 |
| $10.00 - 19.99 | 47.3 | 49.4 |
| $20.00 & over | 25.1 | 18.1 |

Source of above tables: NPD Research.

## Men's Jackets (Ski Jackets/Golf Jackets/Windbreakers)

### Purchases of Ski Jackets, Golf Jackets & Windbreakers by Store Type, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| National chains | 26.3 | 28.3 |
| Discount stores | 23.8 | 22.7 |
| Department stores | 18.4 | 16.6 |
| Specialty stores | 16.0 | 15.4 |
| Other stores, incl. factory outlets | 15.5 | 17.0 |

### Purchases of Ski Jackets, Golf Jackets & Windbreakers by Price Points, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Less than $14.00 | 31.2 | 10.7 |
| $14.00 - 29.99 | 42.0 | 33.2 |
| $30.00 & over | 26.8 | 56.1 |

(continued)

CONSUMER BUYING HABITS

## Men's Jackets (Ski Jackets/Golf Jackets/Windbreakers)

### Purchases of Ski Jackets, Golf Jackets & Windbreakers by Month, 1981

| | Jan. | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Units | 8.2% | 7.6% | 7.6% | 5.7% | 5.1% | 3.5% | 3.1% | 5.1% | 7.2% | 11.9% | 12.4% | 22.6% | 100.0% |
| Dollars | 10.3 | 7.4 | 6.3 | 3.9 | 3.6 | 2.2 | 1.4 | 5.5 | 5.6 | 15.2 | 13.3 | 25.3 | 100.0 |

Source of above tables: NPD Research.

## Men's Shorts

### Purchases of Shorts by Store Type, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Discount stores | 34.3 | 23.1 |
| Department stores | 23.8 | 30.8 |
| National chains | 19.1 | 18.1 |
| Specialty stores | 8.3 | 12.2 |
| Other stores, incl. factory outlets | 14.5 | 15.8 |

### Purchases of Shorts by Price Points, 1981

| | Units | Dollars |
|---|---|---|
| Total | 100.0% | 100.0% |
| Less than $4.00 | 25.1 | 7.8 |
| $4.00 - 7.99 | 32.1 | 24.9 |
| $8.00 - 11.99 | 23.9 | 30.1 |
| $12.00 & over | 18.9 | 37.2 |

### Purchases of Shorts by Month, 1981

| | Jan. | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Units | 1.7% | 2.1% | 4.7% | 9.0% | 15.6% | 30.4% | 18.0% | 7.7% | 4.6% | 1.4% | 1.3% | 3.5% | 100.0% |
| Dollars | 2.0 | 2.3 | 5.0 | 9.2 | 14.5 | 30.8 | 18.8 | 6.7 | 3.7 | 2.0 | 1.2 | 3.8 | 100.0 |

Source of above tables: NPD Research.

## Men's Active Sportswear

Discount stores were the most popular place of purchase for men's active sportswear in 1981 with a 29.4% share of the market, according to NPD Research data published in Men's Wear magazine (May 10, 1982).

CONSUMER BUYING HABITS

## Men's Active Sportswear

### Purchases of Men's Active Sportswear by Store Type

| | Percent of Units Sold | |
|---|---|---|
| | 1981 | 1980 |
| Total | 100.0% | 100.0% |
| Discount stores | 29.4 | 27.8 |
| Department stores | 23.2 | 22.3 |
| National chins | 22.9 | 23.8 |
| Specialty stores | 12.2 | 13.9 |
| Other stores, including factory outlets | 12.3 | 12.2 |

Source: NPD Research.

## Men's Swimwear

### Purchases of Swimwear by Type

| | Percent of Units Sold | |
|---|---|---|
| | 1981 | 1980 |
| Total | 100.0% | 100.0% |
| Boxers | 76.5 | 77.1 |
| Briefs | 16.0 | 15.3 |
| Bikinis | 6.1 | 2.4 |
| Swimwear sets | 1.4 | 5.2 |

### Purchases of Swimwear by Store Type

| | Percent of Units Sold | |
|---|---|---|
| | 1981 | 1980 |
| Total | 100.0% | 100.0% |
| Department stores | 32.5 | 23.2 |
| Discount stores | 28.3 | 25.6 |
| National chains | 15.4 | 17.7 |
| Specialty stores | 13.3 | 15.8 |
| Other stores, incl. factory outlets | 10.5 | 17.7 |

(continued)

## Men's Swimwear

### Purchases of Swimwear by Price Points

| | Percent of Units Sold | |
|---|---|---|
| | 1981 | 1980 |
| Total | 100.0% | 100.0% |
| Less than $5.00 | 29.9 | 40.6 |
| $5.00 - 8.99 | 34.3 | 29.9 |
| $9.00 - 12.99 | 21.2 | 18.1 |
| $13.00 & over | 14.6 | 11.4 |

### Purchases of Swimwear by Month, 1981

| | Jan. | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Units | 0.5% | 1.8% | 2.8% | 9.7% | 15.8% | 30.5% | 20.5% | 7.4% | 4.9% | 2.2% | 3.0% | 0.9% | 100.0% |
| Dollars | 0.6 | 2.7 | 2.6 | 9.8 | 16.1 | 34.7 | 19.2 | 6.6 | 5.1 | 0.9 | 1.2 | 0.7 | 100.0 |

Source of above tables: NPD Research.

## FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in December, 1982): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (1981 Edition available now -- 1982 Edition will be available in November 1982): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES (November): Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

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